

**CAS/CAIS USERS GROUP MEETING
OCTOBER 21-23, 2003**

Meeting Minutes

Introductions and Administrative Matters: Thirty-three attendees from 11 sites participated in this users meeting. Sites represented were LANL, LLNL, Portsmouth, Paducah, Richland, Oak Ridge Nat. Lab., Y12, Pantex, NREL, WIPP, and NTS. The new member was Mike McGrady from NREL. Terry Christie welcomed the return of Dennis McDermitt as project director and announced the retirement of Ken Baker again. Ken mentioned he was relinquishing his duties and would be cashing out his accumulated annual leave and retiring on January 2nd, 2004. This announcement is for real!

The purpose of this meeting was to get feedback from the user community on CAIS tasks planned in FY 2004 and provide some background and an understanding of RS Means cost development methods, and provide an overview of their CostWorks program.

Each site discussed the status of their program. Each site is doing well and experienced no problems with the 2003 deferred maintenance call. LANL had a formal presentation of their CAS program status.

CAIS Status Ken Baker & Dennis McDermitt, OECM (ME-90) & RSIS
Presentation – CAIS PROJECT STATUS

There are over 16 sites using the program with the newest users being NREL and soon to be connected, ANL-W. The major emphasis for CAIS will be centralization, developing a project formulation module; costing improvements to the database; CMMS links; a rehab and improvement part 2 update; and a web study. Each was discussed in detail along with proposed completion schedules and prioritized at the conclusion of the presentations. Six program offices and OECM will be sharing the costs in the CAS program support tasks. Nuclear Energy (NE) is the only program office that has all its sites using CAIS.

Project Module Formulation Ken Rowe and Chuck Siegfried
Presentation – PROJECTS MODULE

Ken and Chuck showed how the proposed Projects Module will work with the CAIS software. There was consensus that we should go ahead with the development of this enhancement. The following requirements were identified:

1. It was agreed that the Funding Source and Funding Type should be user defined.
2. Inspection Units (IUs) that are part of projects should have an indicator to identify them as being part of a project.
3. There should be a project phase dropdown with the following statuses: Planning, Execution, Completed.
4. IUs that are part of projects that are in the Execution stage or Completed stage should not have their costs updated.
5. When a project is completed, after a verify step, set all of the status flags for the IUs to completed.
6. Make a projects summary report that reports on the projects without the details. This will be a high level report to give an overview of all or many of the projects.

Sites are requested to forward additional ideas or requirements throughout the months of November and December. RSIS will distribute a draft Requirements Specification for the Projects Module in January 2004.

Rehab and Improvement Costs (RIC) Part II

Ken Rowe

Presentation – RIC PART II

Ken presented a proposed solution to the potential double counting of deficiencies that could also be included an IU as an upgrade. After a group discussion, it was agreed that this functionality was not a high priority for the CAS community at this time.

CAIS Costing Enhancements

Ken Rowe and Robert Gair

Presentation – COSTING ENHANCEMENTS

Ken and Robert discussed the additional RS Means costing books that could be added to the CAIS database in the future. There was consensus that we should move forward and add all RS Means costs that are available including: Plumbing, Electrical, HVAC, Heavy Construction, Assemblies, ADA and Green cost items.

Centralization Demo

Mark Herrgott

Presentation – CENTRALIZATION STATUS

Mark demonstrated the new centralized CAIS database and client software on a laptop. The demonstration verified that multiple sites could use CAIS while still maintaining their customized look-up tables, site-defined fields, and cost adders. By logging in as three different sites, Mark showed that one site could not see the data of another site.

CAIS Web Study / CMMS Links

Dennis McDermitt

Presentation – WEB STUDY

Dennis discussed CMMS systems that are used throughout DOE, citing Maximo and Passport as the most common. Because RSIS has additional DBA support available, it will be possible to aid sites in setting up links between a CMMS and CAIS. Dennis asked if any site was interested and received affirmative responses from NTS and Pantex. Dennis then stated that RSIS could begin working on custom links in the January-February timeframe.

Next, Dennis gave an overview of the possible benefits of converting CAIS to a web application. These include easier software deployment, better security, more current technology (PowerBuilder is obsolete), elimination of the Oracle Client, elimination of Oracle version problems, easier network connectivity, and compliance with the DOE Enterprise Architecture. In general, a web architecture would be easier to maintain and deploy, requiring less work by the sites to upgrade to a new version of CAIS.

RSIS will perform a cost-benefit analysis for moving CAIS to the web. This analysis will include more details about the advantages of migrating CAIS. Dennis stated that this web study would be released in January, after the deployment of centralized CAIS has begun. As an aid to evaluating the usefulness of a web-based CAIS, a prototype will be set up against the centralized test server.

At the end of the presentation, priorities for the CAS project were set in the following order of importance:

1. Centralization
2. Projects Module
3. Costing Improvements
4. Web Study
5. CMMS Links
6. RIC Part II (low priority)

PBFS Condition Assessments for DOE – Lessons Learned Chuck Siegfried
Presentation – LESSONS LEARNED

Chuck summarized lessons learned during PBFS condition assessments at Y-12, LANL, Pantex, NREL, and Savannah River. Among problems encountered during field inspections, the most significant was the improper selection of WBS's for inspection units. Another major problem was the lack of understanding in the field about how CAIS information is given to FIMS.

Chuck's presentation provides a summary of all lessons learned. The CAS team will be looking at ways to improve the project, based on Chuck's input.

Site Enhancements Wish List Mark Herrgott
Document – ENHANCEMENT LIST

Mark began by reviewing the enhancements that have been accomplished since the Users Meeting in March 2003. It was noted that some enhancements on the "wish list" were put on hold over the last 6 months due to the effort involved in centralization, UNIFORMAT II conversion, and the 2003 cost upgrade. Mark then lead the group through a re-prioritization of the enhancements list. The resulting priority list will be available on the CAS web site. Dennis stated that the RSIS team would look at the high-priority enhancements and develop an implementation schedule that will be distributed to users.

RS Means Costing Seminar Barbara Balboni, RS Means

Barbara Balboni is an architect with RS Means and is responsible for developing the Sq. Ft models being used to estimate the Replacement Plant Values (RPV) in FIMS. Barbara had just completed a two day seminar Las Vegas before making her special abbreviated presentation to the Users. Course material included a modified Sq. Ft and Assembly seminar notebook, and the standard RS Means Assembly and Sq. Ft Cost handbooks. Barbara explained the methods RS Means employs in developing their various unit costs; the various cost factors and fees that are used in preparing estimates; and the extrapolating techniques she has developed in estimating an RPV using CostWorks. She gave a brief outline of the CostWorks program. CostWorks is RS Means automated, Windows tool of all their costing estimating products. DOE is interested in using the CostWorks square foot models to estimate RPVs and adding the DOE custom models to CostWorks to improve the accuracy and flexibility for estimating RPVs. Barbara covered the various reference aids in each cost manual, city cost indexes and location factors that can aid in estimating RPVs. Barbara will be involved in the development of any customized DOE common adders, parameters, DOE assemblies, and customized reports needed from CostWorks.

Replacement Plant Value Derivation Ken Baker, OEMC (ME-90)
Presentation – RPV MODELS

This presentation covered the definition of RPV, its generation using FIMS models and site methods; the Asset Condition Index (ACI) calculation and RPV model development plans for FY 2004 and FY 2005.

Currently DOE uses 27 RS Means standard models and 34 custom models developed by RS Means for DOE. The latest version of the models recently underwent complete revision as a result of a QA by LLNL and reviews by NTS and RSIS computer programmer, Ken Rowe. The revisions were completed in late July and will be added to FIMS at the end of January when RS Means releases their 2004 unit costs. All future model updates will take place in January of each year when new model unit costs are issued by RS Means. In 2004, 31 additional models will be added to FIMS. LBNL is proposing 17 and ANL-E 4 new building models. NNSA is taking a bold step in proposing 10 OSF models that deal with utility systems (steam, water treatment, sewage, chilled water, compressed air, gas and electric distribution networks) pavements, fencing, and communication systems. The development of these models will rest entirely on the sites providing as-built drawings and narrative descriptions. Pantex, Y12, NTS, LANL and LLNL will be helping in this effort. All DOE sites will be asked to participate in some fashion. For FY 2004, OECM is advocating the purchase of CostWorks. CostWorks is a very unique tool that will enhance the accuracy and flexibility for sites to tailor the RPV models to each asset. The adoption of CostWorks will be in two phases. The first phase will include the integration of the existing 34 models. This will be accomplished in late 2004. The second CostWorks release will add the 31 building and utility models developed in 2004 and be released in late FY 2005.

CostWorks Demonstration Robert Gair, RS Means

Bob is the Fed contact we deal with regarding any RS Means product. Bob Gair's presentation covered the six exterior wall and structural system options; the variable gross square footage and common additive features that are available for each RS Means model. There are 70 standard models in CostWorks. DOE uses 27 of these in FIMS. Bob demonstrated how the Estimator function could change individual line items selected from the RS Means assembly data base. This database will include the assemblies developed for DOE unique models. CostWorks permits the user to include cost adders (ala Site Factor) to the RPV estimate calculation. CostWorks was not designed to permit the user to design/create models. It is primarily an editing tool. Sites would modify these generic models using the CostWorks features and change specific line items using the CostWorks Estimator features. The site user, most probably the site estimators, would modify the base model to meet specific characteristics of each asset such as exterior wall and structural systems, number of elevators, stories, gross square footage, etc. The biggest concerns by the attendees dealt with implementation issues. See the **Actions** section at the end of the minutes. Currently NTS and LLNL are using the CostWorks program for estimating RPVs.

The RPAM Era Begins Ken Baker, OECM (ME-90) Presentation – RPAM

The relationship of RPAM with condition assessments, CAIS, and the Asset Condition Index and Asset Utilization Index metrics was presented. The order covers all assets. CAIS is mentioned in the new order three times. The CRD states "Deferred maintenance estimates will be based on nationally recognized cost estimating systems or the DOE Condition Assessment Information System (CAIS)". LCAM was silent on CAIS! Building deficiency systems will be reported to FIMS on the basis of FCI. The CAIS link to FIMS includes the ability to do this. A RPAM roll-out course is being developed that will include program office presentations on what is expected from their respective sites. Ken also mentioned the plans for FIMS validation that will start in March 2004. Program office staffers are participating in designing the parameters and expectations for this effort. Emphasis will be on mission critical assets, no trailer trash, and the critical financial, condition and status fields.

Actions:

1. OECM and RSIS will explore all the interface issues that will occur between CostWorks and CAIS and FIMS. Funding for interface development will be split between FIMS and CAIS tasks depending on the scope of each interface.
2. RSIS with the assistance of CAIS users will review the existing CostWorks Common Additives and Parameters choices and recommend changes to meet DOE needs. Façade choices will remain as designed but could change once sites gain experience with CostWorks and information on specific DOE building facades.
3. Sites will submit as-built and narrative descriptions for RS Means to develop Utility models. OECM will assist in this effort and coordinate needs with FIMS program office contacts.
4. OECM will schedule an FDDC meeting to obtain approval of purchasing the CostWorks program.
5. OECM has determined that the appropriate square footage to use when developing an RPV estimate is the "comparable" or present square footage of the asset in question and not the future or reduced size of the asset.
7. Regarding a question from NTS on excess facilities deferred maintenance reporting... At Non-Closure Sites, for excess building and trailers with the following building status categories, only report deferred maintenance estimates for deficiencies (that if left uncorrected) would result in situations where worker, public health, or safety concerns would result. The building status categories are the following: Shutdown Pending Transfer; Shutdown Pending D&D, Shutdown Pending Disposal, D&D in Progress and Deactivation. This guidance was issued in September 2001.

CAIS Training

Several sites have expressed interest in another CAIS Inspector / Administrator course. We will explore having two sessions in Las Vegas in late January. Sites that have expressed interest include NTS, Y-12, NREL, and ANL-W. We will also explore the idea of scheduling one CAIS training session annually.